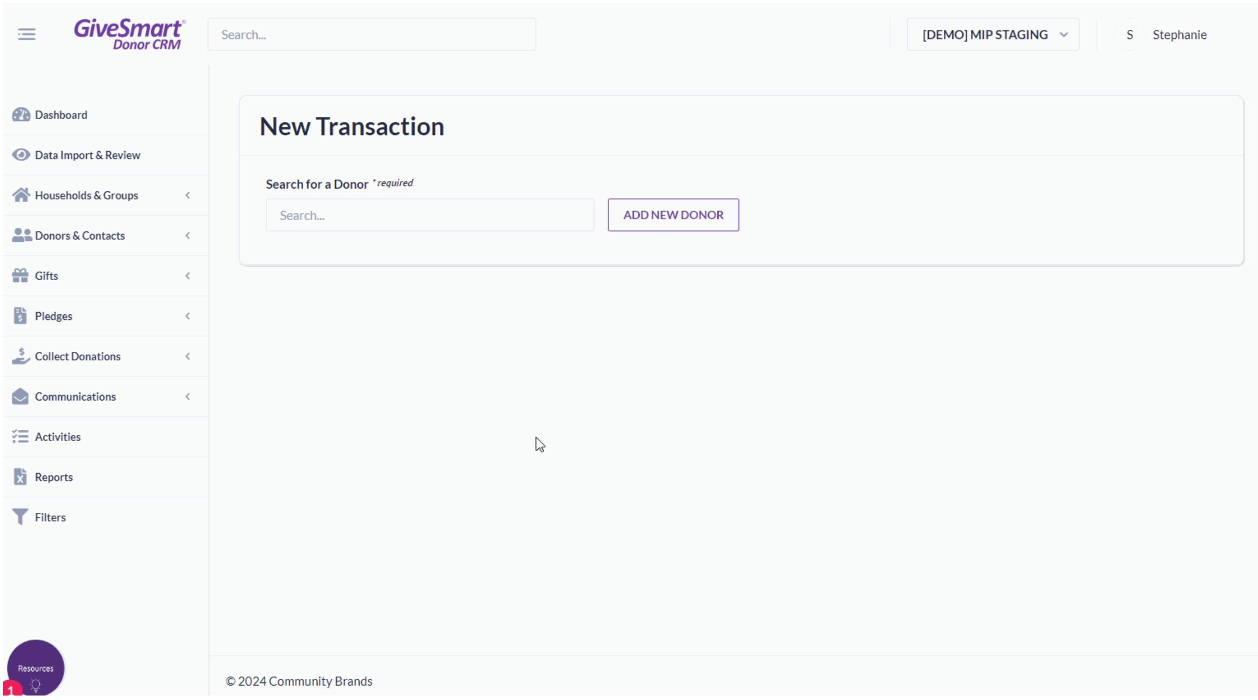
Add a New Gift

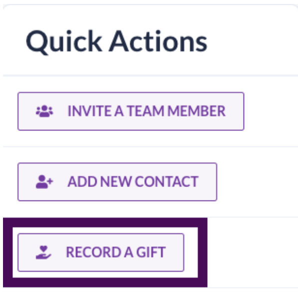
Last Modified on 06/27/2024 1:04 pm EDT

Watch this video to learn how to add/document a new gift in your GiveSmart Donor CRM account.

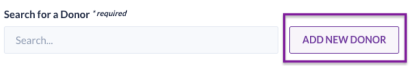


Steps to add a gift record

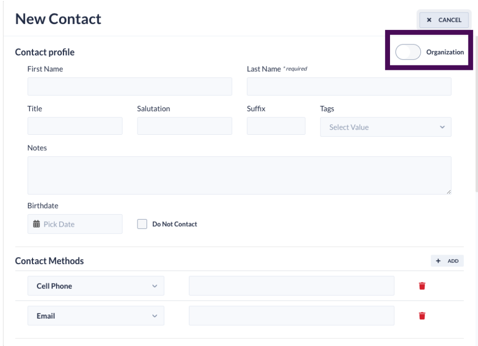
1. From the Quick Actions container within the dashboard, click **RECORD A GIFT**

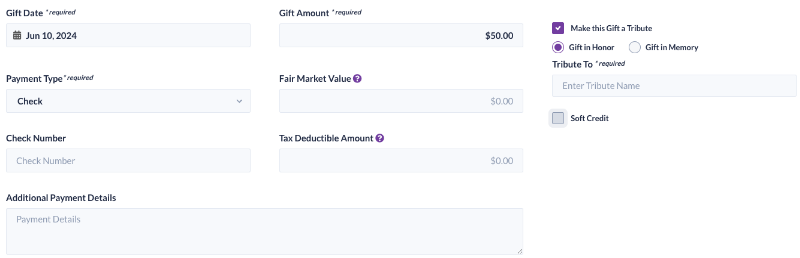
   

   -
2. Select a donor
   - Add to existing donor
     - Search for donor and select
   - Add to new donor
     - Select **ADD NEW DONOR**

       -
     - Enter donor details
       - If a new contact is an Organization, toggle to 'Organization' in the upper right corner



3. Select solicitation method
4. Enter gift details
    - Choose if the gift will be a Tribute or needs a Soft Credit (Optional)
        - 

        - Make this gift a **Tribute**
            - select the box next to Make this Gift a Tribute
            - choose between Gift in Honor or Gift in Memory
            - enter the name of the tribute
        - Add a **Soft Credit** to this Gift
            - select the box next to Soft Credit
            - enter the name of an existing contact, and select from the dropdown or select Credit Additional People to add a new contact
            - click the dropdown arrow next to Amount to choose between a dollar amount or percent
            - enter the amount of soft credit this contact will receive
        - **NOTE**: A soft credit report can be viewed by selecting **Gifts** from the left navigation and choosing **Soft Credits**.
5. Select thank you method
    - Email only
    - Letter & email
    - Letter only
    - No thank you letter
6. Add optional details
7. Enter custom field info (if available)
8. Select Summary to review the details then click **Submit**